

27 Estate Documents you need to put in one place*



The Essentials

1. Will
2. Letter of Instruction
3. Trust Documents
4. Financial Power of Attorney (POA)



Marriage and Divorce

5. Marriage License
6. Divorce Papers
7. Military Documents (DD214)



Health-Care Confidential

8. Personal and Family Medical History
9. Durable Health-Care Power of Attorney
10. Authorization to Release Health-Care Information
11. Living Will
12. Do-Not-Resuscitate Order



Proof of Ownership

13. Housing, Land and Cemetery Deeds
14. Escrow Mortgage Accounts
15. Proof of Loans Made and Debts Owed
16. Vehicle Titles
17. Stock Certificates, Savings Bonds and Brokerage Accounts
18. Partnership and Corporate Operating Agreements
19. Tax Returns



Life Insurance and Retirement

20. Life Insurance Policies
21. Individual Retirement Accounts
22. 401(K) Accounts
23. Pension Documents
24. Annuity Contracts



Bank Accounts/Social Media

25. List of Bank Accounts
26. List of all User Names and Passwords
27. List of Safe-Deposit Boxes

